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ABSTRACT

The theory of perspective transformation was used as a framework for a study of volunteerism among older adults, examining whether volunteering in community organizations in late adulthood brings about transformation in meaning structures in later life development, and if and how it affects aging at both the individual and societal levels. Two qualitative case studies of older volunteers in Toronto were conducted, using life history interviews and participant observation. The case studies suggest that applying transformative learning theory to the study of later-life development and aging can help shift the focus of view, allowing one to see older adults not as mere "objects" of the problem of aging, but "subjects" who can participate in fixing problems, making a linkage between personal and societal development. The cases of the two volunteers show that, if proper roles and conditions are provided, older adults can contribute their skills and wisdom to society. The communicative and holistic type of learning fostered by volunteering leads to critical reflections that help them confront the dilemmas associated with aging and proceed with their lives, shifting their old assumptions about themselves and the world around them. This can gradually lead to a clearer sense of self, a more accepting view of individual and cultural heterogeneity, a deeper understanding of society, and a heightened level of social integration. To facilitate this movement, policymakers need to develop volunteer programs for older adults in a more effective way. (Contains 45 references) (KC)

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Transformative Learning Theory and the Study of Aging: The Implication of Case Studies of Older Volunteers

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Introduction

The theory of transformative learning, originally introduced by Jack Mezirow (1978, 1990, 1991, 1994,1996), has stimulated much discussion in the field of adult education. Nevertheless, it has never been directly applied to the study of aging. In this paper, I will attempt to use this theory of perspective transformation as a framework for my study of volunteerism among seniors, examining whether volunteering in community organizations in late adulthood brings about transformation in meaning structures in later life development, and if and how it effects aging at both the individual and the societal levels. To this end, I conducted two qualitative case studies of older volunteers in Toronto using life history interviews and participant observation. The paper will be divided into three main sections. The first will provide a brief background for the issues I will address. The second will consist of a theoretical discussion including an overview of transformative learning theory and why I think that theory is important to the field of critical gerontology. The third portion of the paper will summarize the results of my case studies and their implications.

I. Context

Why is it important to shed light on voluntarism among older adults today in Canada and other industrialized nations? According to Statistics Canada, the ratio of people over 65 will almost double from 11.4% in 1990 to 22.4% in 2030 (Norland, 1994). This demographic shift, which has been called a "demographic time bomb", has raised worries that too many dependent elderly will be riding on the shoulders of younger generations. Yet, such gloomy forecasts about an aging

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society, by lumping all "seniors" into one group characterized as "dependent", avoid dealing with the problem of "structural lag", especially "the lack of role opportunities in society to utilize and reward strengths of the mounting numbers of long-lived people" (Riley and Riley, 1989, p.15). Given the increasing number of younger and healthier early retirees, it is imperative to develop new visions and strategies to promote positive and productive aging. Volunteering seems to be a key element in this endeavor, as has been suggested by previous studies (Caro & Bass, 1995; Okun, 1994).

Although, as non-paid labour, volunteer activities still tend to be invisible and low status, in fact they are a vital part of Canada's "social economy" (Quarter, 1992). Recently, Statistics Canada reported that 31.4 % of Canadians over the age of 15 -- in other words 7.5 million people -- volunteered their time and skills in non-profit organizations (NPOs), an increase of 40 % since 1987. These volunteers contributed a total of over 1.1 billion hours during the year, the equivalent of 578,000 full-time year-round jobs. In spite of this general trend, however, the participation ratio of volunteering among older Canadians remains lower than that of younger age groups. For example, in 1997, 23 % of those over 65 volunteered compared with 37 % of people aged 25 to 44 (Minister of Industry 1998). This suggests that volunteering among seniors may expand if appropriate activities are offered (Chappell & Prince, 1997).

The fraying of the social safety net is another major problem confronting Canadian society. Given low economic growth and the change in the age structure of the population, the welfare state has been transformed: now we have leaner governments, more privatization, and an emphasis on individual responsibility for self sufficiency. Correspondingly, third sector NPOs have been increasing their roles to fill the gaps in community social services. Yet, the voluntary sector is also in "turbulent times" (Phillips, 1995), facing serious reductions in funding. Given increasing demand and decreasing financial support, NPOs are confronting an expanding need for volunteers. This in turn invites a careful reconsideration of the potential contributions of under-utilized older people.

II. Theoretical framework

II. 1. Transformative learning theory: an overview

Transformative learning theory, a comprehensive and idealized model of adult learning, uses constructivist assumptions to focus on the process of adult learning. The core of this process can be found in our meaning structures -- the broad set of psychocultural assumptions that frame our world view. The constant revision of these meaning structures through experience and learning can lead us toward a more liberated viewpoint. Mezirow (1991) summarizes the theory as follows:

> Transformative learning involves an enhanced level of awareness of the context of one's beliefs and feelings, a critique of their assumptions and particular premises, an assessment of alternative perspectives, a decision to negate an old perspective in favor of a new one or to make a synthesis of old and new, an ability to take action based upon the new perspective, and a desire to fit new perspectives into the broader context of one's life, beliefs and feelings. Perspective transformation involves (a) an empowered sense of self, (b) more critical understanding of how one's social relationships and culture have shaped one's beliefs and feelings, (c) more functional strategies and resources for taking action. (p.161).

Mezirow's theory emphasizes a "critical reflection of assumptions supporting our beliefs, discourse to validate our beliefs, and reflective action upon the insights resulting from the transformation of meaning structures" (Mezirow, 1994, p.224). These structures (consisting of "meaning schemes" and "meaning perspectives") are transformed rationally through critical reflection. The model outlining the process of transformative learning is linear and comprised of eleven phases. Basically, it begins with a disorienting dilemma followed by a self-examination of feelings, critical reflection, exploring and planning new roles, negotiating relationships, building confidence, and reintegrating the new perspective into one's life. Ultimately, its goal is that action be taken to transform oneself and society (Mezirow, 1991).

Mezirow's transformative learning theory has been built upon by many other researchers, witness Taylor's (1997) extensive review of major empirical studies over the last two decades. Taylor finds broad support for Mezirow's theory, but at the same time suggests that it should be reconceptualized within a more holistic and contexually-grounded framework (i. e. one which pays more attention to the role of emotions, alternate ways of knowing besides rational thinking,

collaborative and supportive relationships with others, compassion and, ultimately, transcendence). Within this new holistic interpretation, the societal dimension of adult learning appears more clearly. In other words, transformative learning can not only promote individual autonomy and independence, it can also build interdependence and connections, empowering adults to take collective action in their own communities to reform social practices.

II. 2. The advantages of transformative learning theory

One of the strengths of transformative learning theory is its unconventional view of adult development. Mezirow (1991, 1994) identified the process of transformation of meaning structures with adult development, which is taken not simply as *growth* and *progress* within social expectations associated with the life course, but as a fundamental *shift* of the psychocultural assumptions which determine the horizons of our expectations. Established major models of adult development (e.g. Bruner, 1986; Erikson, 1963, 1986; Gould, 1978, 1990; Levinson, 1978), in which the process of human development is presented as rigidly fixed stages or phases within a normative life-course, have both positive and negative sides. On the one hand, the tasks prescribed by developmental psychologists for each life stage or phase help us search for new roles and meanings as we advance in our life; yet, on the other, they tend to incorporate hegemonic and age-graded stereotypes, ignoring the fact that individual heterogeneity and cohort differences become more evident as we grow older. Moreover, most of these models basically view individuals as mere reactors to normative life cycle changes, instead of examining them as potential initiators of social transformation. In this sense, the view of adult development in transformative learning theory, by rejecting age-relevant hierarchical stages and emphasizing more holistic and contextually-grounded interpretations, holds the promise of broadening the possible outcomes of aging.

Another advantage of the application of transformative learning theory to the study of aging is its capacity to articulate the dynamic interplay between the interrelated levels of individual development and social transformation. The problems connected to aging are not only personal

but social. To deal with this multilayered complexity, it would be ideal to encompass both the micro and macro dimensions when making one's analysis. Nevertheless, since it is almost impossible to design a theoretical framework which satisfies both realms, the field of social gerontology over the last three decades has studied aging in dichotomy. Most studies grounded in the sociological domain still discount the heterogeneity of individual aging; while studies in psychology tend only to focus on self-development, taking social structure for granted.

Transformative theory's approach to the relationship oetween individual and society is dialectical -- a given level of development on one side of the relationship is a condition for development on the other side (Tennant, 1993). According to Mezirow (1994), transformative learning is defined as " the social process of construing and appropriating a new or revised interpretation of the meaning of one's experience as a guide to action"; a part of its goal is "to motivate learners to take collective social action to change social practices, institutions or systems" (p.222-223). Clearly, transformative learning theory aims to go beyond the personal level. In fact, however, Mezirow's theory only deals with the individual side of the individual-social dialectic at the expense of the social side. What is required is a theoretical analysis of both sides of that relationship (Clark & Wilson, 1991). Although Mezirow acknowledges that culture and social structure shape an individual's experience and life, in the absence of any concrete evidence of transformation at the social level, his theory of the dynamic interplay of individual and society sounds a bit utopian.

Despite this weakness, however, Mezirow's attempt to link individual and social development is noteworthy. Transformative learning theory allows researchers to analyze social structures through the experience and reflection of each individual, shifting the burden for social analysis onto the learner. The expected outcome of such critical reflection is the creation of more liberated and empowered individuals who can actively initiate social action. Transformative learning theory is thus rooted in the "emancipatory paradigm" (Mezirow, 1996) or in a "harmonious combination of science and advocacy", to use Weiland's (1995) term. This makes it naturally relevant to critical gerontology and the study of aging.

II. 3. Critical gerontology and transformative learning

Critical gerontology, which has emerged over the last decade and half, is a relatively new approach to the study of aging. As advanced by Habermas, it seeks to broaden the context of the study of aging by introducing subjective, interpretative and emancipatory dimensions to the issue. It concerns itself with identifying possibilities for change within social structures, policies and values regarding old age, and with promoting positive ideas for the last stage of life. In this vein, for example, Moody (1989) proposed the concept of productive aging, calling old age an "abundance of life". He argued that conventional policies regarding seniors tend to see older people simply as unproductive rather than as having something to contribute. He therefore advocated "thinking boldly about how an unprecedented abundance of life could be mobilized for the benefit of both older people and society as a whole" (p.5). Like Mezirow's theory of perspective transformation, the goal here extends beyond the mere promotion of positive aging within the status quo. This theory is also provocative in that it introduces an alternative concept of productivity befitting a service-oriented postindustrial society.

In the same vein, Cole (1992) called for the rediscovery of the cultural meaning of old age, criticizing the loss of the meaning of growing old in modern Western society. He suggested that, "Our culture is not much interested in why we grow old, how we ought to grow old, or what it means to grow old" (p.xx). The theory of transformative learning, in this regard, helps us speculate about the meaning of adult development at both the personal and social levels. Mezirow (1994) described the possible outcomes of revising one's meaning structures as follows:

> Adult development means the progressive realization of an adult's capacity to fully and freely participate in rational dialogue, to achieve a broader, more discriminating, permeable and integrative understanding of his/her experience as a guide to action (p. 226).

Action here is both individual and collective. Although transformative learning theory doesn't directly focus on late adulthood, the goal of adult development suggested in the theory -- moving away from an egocentric, narrow-minded, and nonreflective view of the world -- seems to be especially relevant to older adults. It is significant that the "unified rational self" (Tennant, 1993)

proposed by Mezirow as the end point of adult development overlaps with the higher developmental tasks -- "ego integrity" and "transcendence" -- prescribed by Erikson. Should we recapture and reconstruct these classic concepts of later life development within the current social context? Might they hold the key to establishing new meanings for old age in mass-longevity society? These are controversial questions, and the answers seem to depend how one conceptualizes the term "perspective transformation".

Regarding this point, Tennant (1993, 1994) and Mezirow (1994) have different viewpoints, which emerge in an interesting exchange of ideas between them. The argument was initiated by Tennant who emphasized the need for adult educators to distinguish clearly between normative and fundamental transformative development, arguing that the former -- i.e. the progress through life-course stages or phases within a taken-for-granted world view -- lies outside the definition of "transformative" development which, in his view, includes questioning one's assumptions about the status quo. He criticized Mezirow (1991) for not explicitly addressing this distinction, linking Mezirow's "transformation of meaning schemes" with normative development, and "transformation of meaning perspectives" with fundamentally transformative and emancipatory development.

In response, Mezirow (1994) argued that there is no point dichotomizing these two types of development. In Mezirow's view, transfomative learning doesn't necessarily require a critique of society per se as long as it includes a critical awareness of the socio-cultural context shaping our assumptions. Understanding one's psychological or epistemic processes through cultural activities, like studying mathematics or reading novels, could be as important to one's adult learning project as participating in collective political social action. It would be a mistake to see movement through the normative life-course as mindless cultural assimilation, while assuming that only radical collective social action brings fundamental perspective transformation: "meaning perspectives and meaning schemes are two dimensions of the same learning process, and the process by which adults learn -- through the elaboration, accusation, and transformation of

meaning schemes and perspectives -- is the same as the process of adult development" (Mezirow, 1994, p. 228).

I completely agree with Tennant that human development needs to be understood as an individual-social dialectical process, and that, since the social expectations tend to shape this relationship, adult education should consciously provoke individuals to fundamentally question the socio-cultural world and their place in it. At the same time, however, I cannot help wondering whether the concept of adult transformation and transformative learning should be limited, as Tennant advocates, to refer only to a drastic perspective shift (which happens *only* out of normative life-course development) involving a certain level of social critique and political action. Although I'm not an adherent of age-graded "stage" theories, and I know that developmental needs or tasks should be critically examined as social constructs which can invisibly institutionalize age, still, I believe many developmental tasks contain some validity. For example, "generativity" [1], "ego-integrity" and "transcendence", seem to me to be universal virtues which should be developed throughout our life span. Is it no more than a passive and uncritical acceptance of social reality as defined by others if one tries to pursue these qualities in one's life? While the problems faced by older adults in modern society are partly rooted in the age-graded life-course paradigm, at the same time, they need social supports to help them fully cultivate their potential to achieve these higher developmental qualities. In short, I dispute Tennant's view that real transformative change can only take place outside the process of so-called normal development, and that it must always explore alternative avenues. Transformative learning can help us integrate our experience and alter our perception and behavior even within a so-called normative life-course.

Mezirow's view of adult development -- i.e. the transforming meaning structures (including both meaning schemes and meaning perspectives) so that they become more inclusive,

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[1] Kotre (1984) expanded Erikson's (1963) concept of "biological generativity" by adding cultural aspects, noting "generativity may be defined as the desire to invest one's substance in forms of life and work that will outlive the self, and it is both instinctual and psychosocial, seeing biological as well as cultural outlets" (p.10). Friedan (1993) also expanded the concept of "generativity", asserting that "To be part of the community, to be part of something larger than oneself, to contribute somehow to the ongoing human enterprise, to pass on some legacy to the next generation, is, it seems, a burning need of vital age, different from the parenting of one's children yet just as essential to survival of the human species" (p.612).

differentiated, and permeable -- allows an adult to develop within the framework of given world view, while seeking feasible alternative frameworks at the same time. Although the personal behavioral changes brought about by negotiating meanings of new knowledge and experience (i.e. transformation at the meaning schemes level) might not be fundamental enough to change one's basic world view (i.e. transformation at the meaning perspectives level), if they include critical reflection and connect to actions to reform one's relationship with others and society, they can lead to further political and social action. In other words, change at the meaning schemes level can develop into change at the meaning perspectives level. My question in this study is whether older volunteers do in fact experience transformation, and if so, how it happens and what elements within community volunteering help facilitate it.

III. Case studies of older volunteers

III. 1. Methodology

The method I am employing here is a qualitative case study with life history interviews. In other words, it is not my intention to gather information from a large number of respondents and average the data, although I have interviewed a broad cross-section of senior volunteers. Rather I will provide you with case studies of two individuals, focusing on one particular aspect of their lives. As Sjoberg et al (1991) have observed, "the advantage of case studies .... is that researchers who utilize them can deal with the reality behind appearances, with contradictions and the dialectical nature of social life, as well as with a whole that is more than the sum of its parts" (P.39). The accent on in-depth understanding in the case study method coincides with the emphasis on interpretative and humanistic approach in critical gerontology -- together they help us understand how older people make meaning of their lived experience within their various contexts.

The "life history" method is distinct from the "life story" or other forms of narrative methodology in terms of the role ascribed to context. In Ardra Cole's definition, "life history research places narrative accounts and interpretations in a broader context -- personal, historical, social, institutional, and/or political, going beyond the personal" (Cole, in Hatch & Wisniewski,

1995, p.115). In this regard, case studies with life history is relevant to a study like mine, which analyzes the impact of volunteering on seniors' personal transformations and the broader social context.

In addition, the life history interview is a relevant methodology for the study of aging. According to Rubinstein (1995, p.188), "for many older adults, life review is an essential part of later life psychosocial development, necessitating self-awareness and a recasting of the past life in the context and issues of the present day". The benefits of life history research are reciprocal, providing both researcher and participant with opportunities to reflect and redefine their existing perceptions and knowledge about the world.

As a concrete method for my data collection, I conducted face-to-face life history interviews with each participant, followed by participant observation at their volunteer sites. The interviews were semi-structured with open-ended questions and took sixty to ninety minutes each. I asked participants to talk about how and why they got involved in their volunteer activities, what their main roles were, how they perceived the meaning of their volunteering, and whether their experience had changed them. Interviews were tape-recorded and transcribed and shown to the interviewees to check and negotiate the contents. The participants are two older adults in their 70s, one female and one male, who have been volunteering in separate NPOs in Toronto. (Since space is limited here, I have decided to provide "thick description" of their experiences rather than extend the discussion to others I have interviewed).

The data analysis follows Seidman (1991)'s two-step scheme: the first step crafts a profile of individual participants, which is presented in the participants' words (although the names of participants and the organizations will be changed in the following descriptions); the second analyses the data according to themes and categories. After a separate analysis of each case, I bring the two cases together based on what I see to be overarching themes.

III. 2. Profile of participants

A. The case of Patty

The 74 year old Patty, a small but energetic woman, looks much younger than her age in a bright purple sweater with silver necklace and bracelet. As a second generation Japanese Canadian, she was in an internment camp during the war and went back to Japan with her father when it ended. She got married to a Japanese businessman and lived in Tokyo for more than 30 years, raising their only daughter. After his retirement, Petty came back to Toronto with her husband to spend their retirement life in her native country. She lost her husband two years ago. Despite her daughter's invitation to co-reside in Tokyo, Patty decided to stay in Toronto for the rest of her life. After her husband's death, volunteering at the biggest public nursing home in Toronto, which contains many ethnic minority elderly (including first-generation Japanese immigrants), has become the center of her life. Perfectly bilingual in English and Japanese, she was elected president of the more than 250 registered volunteers in the home. She received an Outstanding Volunteer Award from the mayor of Toronto last year. The interview was done in her tiny volunteer president office.

I started volunteering at this nursing home soon after my early retirement in October 1992. I was working in the human resource section at the head office of a large discount store. The reason I took early retirement was that my husband became a resident here. Although I came every day to take care of him, I was not with him all day. So I decided to spent some time doing volunteer work in this building. During the day-time, I helped at the tuck shop in the main lobby, and in the evening, I went up to the Japanese wing on the six floor to help feeding Japanese elderly who cannot speak English. I had no intention to become a volunteer for the elderly before I retired. And I had no knowledge whatsoever concerning volunteering among seniors until I actually started here.

But as I got to know people, I came to get involved more and more. I realized the needs of volunteers at this nursing home. So I became an advocate for the sixth floor for a few years, acting on behalf of the Japanese residents who don't understand English. If something happened or if they needed something, they could not communicate with the staff or the administration. Even after my husband passed away in August of 1997, I felt that the elderly people here really need someone to support them, so I kept on. Because there is so much need here. Most of the elderly cannot feed themselves, and there are not enough staff to feed them. They are lonely, too, so we need volunteers on every floor.

Since I was elected as president of all the volunteers in 1995, I'm now involved in EVERYTHING. Everything from fund raising to running different weekly programs such as bingo, coffee house, music night, and annual events like the rummage sale and gift program for all the 350 residents for Christmas. On top of that, I'm attending a monthly meeting of the volunteer executives of all the Metro Nursing

Home Associations. I'm so busy. I used to come here seven days a week from the morning to the late in the evening. But this year I decided to take Sundays off, because I sometimes feel tired and need time for myself.

It can be very emotional for me to work here, seeing how people change when they become old-old. I guess that's one of the reasons that we are short of volunteers. younger people don't want to see old people. They might think of themselves getting old and they don't want to face that. I've gone through so many deaths in my family and here that I don't get depressed anymore. It's a part of reality. I learned something from that experience, how you finish your life and how you live. You can tell when people are dying. So I ask the family members to try to come in as much as possible.

My role here is not only dealing with residents, but also with other volunteers, staff, and even family members. A lot of family members don't know how to deal with their old parents. They ask me, "What should I do in this case, and what should I do in that case?" That alone is hectic. Because no family is the same, they are all different. So you have to sort of improvise, and learn by that what you do for the time when the same incident comes up again. Especially there is so many ethnic diversity here: English, Japanese, Korean, Jewish, Estonian, West Indian, they are all different. So you learn about the traditions of the other countries and what they don't like here. When they make complaints, I usually pass them on to the staff and the nurses.

The elderly people here have gone through many wars, some were uprooted from their countries or wherever they had lived, and they worked so hard to make a new life in Canada. So they deserve to be treated properly at the end. A nursing home is not a warehouse where you just put elderly people and wait for them to die, but a place where they can have some kind of enjoyment. There are families who bring their loved one here, and they don't come back. Or there are residents who have no family members in this country. I think that the elderly can have a happy life to the end, even when they don't have their own family, if there is a place like this to call home. Their quality of life can be good until they pass away. So my goal is to keep running as many programs as possible for them. I like to see their happy faces. But it's challenging, you know, because the funding is limited and we are short of volunteers.

I don't know why I like to help people so much. Maybe simply because that's my nature. I've always liked to work with people ever since I was a child. Even during the time I was in Japan, when there were earthquakes or typhoons, I was out there to help the victims. But the real root is .... I lost my mother when I was eight years old. So I was raised by a single parent with my three younger brothers. When I was growing up, my father's friends really helped us. I think that's where the basis of my desire to work for people comes from. People did good to me when I was young, so now that I'm coming close to the end of the journey of my life, I'm paying it back.

People might think that I'm silly to spend every day volunteering here. They suggest, "Patty, why don't you take a vacation and go for a cruise or go to Las Vegas to do some gambling". Well, I may take off for a few days, but that's about it. Because I 'd rather spend my time with the people who need me than stay home and watch TV. I took two days off when I had a really bad cold, and when I came back the residents said to me, " What's wrong with you, Patty? Oh, my goodness, we missed you!". You know, people here were worried about me, which means that I mean something to them. It makes me feel so good. If they said " Oh. Patty is already back. So what?" Then, I'd probably decrease my volunteer work (laughs). But as long as I am wanted and healthy enough to commit myself to serve the community as well as the people, I think I'll continue.

B. The case of John

John, at the age of 72, is an outspoken and friendly gentleman, slender with gray hair, wearing a moss green wool button-up shirt and black pants and metal-framed glasses. He immigrated to Canada in his late 20s from England and spent his professional life in big cities like Montreal and Toronto for 27 years as an industrial chemist for a large chemical company. When he was laid off during the recession of 1984, he moved to Sarnia, a town near Lake Huron with his wife and their youngest daughter. There he worked for a rubber company as a technical editor and writer until his mandatory retirement in 1992. Now he lives in Toronto with his wife. The interview was done at the local head office of a world-wide human rights organization in downtown Toronto. During his rather busy day at the reception desk, he talked about his volunteer experiences.

Well, I got involved with this human rights organization as a volunteer in the mid 1980s, so I've been at it a long time. Even before then, I was a member, because I'm interested in what going on around the world, especially regarding human rights and the death penalty, and this organization supports the principles I believe in.

The time when I really got active was when I moved to Sarnia. Because in a small town like Sarnia, there were few members belonging to this organization. So I thought that it might be a good idea to try to form a group and contacted the head office in Ottawa. They introduced me to another member of the organization in town. We got together and decided to see if we could find other people who might be interested in our activities, putting notices in the local newspaper to call a meeting. It was a snowy February night in 1987, and about 25 people came. The group was still going when I left in 1994 -- I had been the president of the group for all those seven years.

When I came back to Toronto in 1994 and found a place to settle down with my wife, I decided to continue my involvement. Because when you are retired, you have a lot of time in your hands. And I liked to be active during my spare time even when I had a career. I've always being involved in political activities. For 30 years, I was a member of a political party and worked every election, knocking on doors and organizing things. Anyway, I found out where the nearest branch of this human rights organization was and joined that group. Although I tried to keep a low profile this time, about an year and a half later, I became the president of that group again (laughs). I've been the president of the group of 98 people for three years now.

I spend about ten hours for preparation for monthly meetings. I have to prepare the agenda and contact other members to decide what we are going to do that month, whether it's letter writing or watching videos, and so on. Besides, I spend a couple of hours writing letters to put pressure on foreign governments as an ordinary member of this organization. That's not an obligation though, it's completely voluntary. But if you like to write letters, it's interesting to think about the contents. I'm trying to make it concise, about one page, so that people who read will not get bored (laughs).

On one occasion, I heard that our downtown Toronto office needed volunteers. Until a couple years ago, the office was open to the public five days a week. But now, with our funding cut, it's only open for three days because of lack of staff. This office is mainly run by volunteers now. Since I've been a member for so many years I know a little bit about this organization and I'm pretty flexible in my schedule as a retiree, I thought it might be interesting to volunteer in the head office. So I've been a volunteer every Tuesday afternoon since January 1995. It takes about 50 minutes to come here by subway and bus. I usually work here four hours a week in public relations, helping students and refugees, giving them proper information about the condition of human rights and the worldwide movement of this organization. Well, volunteer work here is not one of those jobs that's always busy and exciting. Some days, like today, you have lots of phone calls and visitors with inquiries. Other days, it's very quiet and no questions from students. So sometimes it could be, you know, a little bit boring.

I suppose one of the things I always think of is ... I was a young boy who lived in England during the 1930s and the War. And on top of that, I'm Jewish. So what happened in Europe was a kind of hell. If this human rights organization had existed then, maybe more people may have been saved. Maybe I'm a little bit naive, but whenever I see something terrible happening in various countries around the world, I feel I should do whatever I can to help those who cannot help themselves like people in prison or who are being tortured or put to death, just because of their religious or racial background or whatever. It's something we should all try to work for. Of course, on a day to day basis, you don't see any drastic change. But if you didn't do it, the world would be a worse place.

Being a senior citizen and having a lot of time on my hands, this volunteer work also gets me out of the house. It's very easy when you are retired to just sit at home, read, watch TV, or things like that. It can became tedious, especially if it's just you and your wife. You have to have something to get you out of the house; you need to meet other people. You need some motivation or goal or something to keep you active. Although I like reading a lot, listening to music, playing chess with friends and spending summers in the country, I didn't go out very often in winter. That's the one of the main reason I got involved in this volunteer work.

I do want to do a variety things through volunteer work. Actually, besides volunteering for this organization, I volunteer for the "tax clinics" that help fill out tax return forms for senior citizens, people on low income, and new immigrants. I am also voluntarily participating in a research group at the University of Toronto. It's called "Memory Lab" and they are doing research to see how people retain their memory, how it deteriorates as you grow older, that kind of thing. Two or three times a year they call me to come down to take a computerized test. It makes me feel I'm still young enough to be able to do things that may eventually help others (laughs).

My wife's parents are still alive -- her father is 94, and her mother is 90. They live in a seniors' home, but their quality of life is very low. My father-in-law is almost blind and pretty deaf. They just sit around all day, and wait for meal time and sleep. When you see what can happen to you as you get old, you realize you cannot control your aging. Until a few years ago, they were very active people. I cannot say my health is excellent. But I'm still physically and mentally healthy enough to be able to make a contribution and enjoy what I have left. My goal in life right now is to live as healthy as I can and as productive as I can until a decent old age, not indecent (laughs).

III. 3. Findings

The life of a human being is way too complex and profound to understand completely through an interview of one hour or so. Yet, Patty and John's narratives about their volunteer experience powerfully embody a part of their "lifeworld", including their personality, values, ideals, happiness, agonies, and so forth. Moreover, what each reader learns from these stories is different depending on their own situation: I, for example, analyzed each story and compared the two people in order to see if they experienced the transformation of meaning structures through their volunteer experience. Patty and John have two different profiles. Their life experiences, their living circumstances, and the contents and frequency of their volunteering are significantly dissimilar. Nevertheless, several overarching themes emerge from a comparison of their cases.

First, although both have always had an active life style and were keen about helping out others in need throughout their lives, major traumas triggered their serious commitment to volunteering. For Patty, it was the death of her spouse and her decision to stay in Canada by herself. Patty didn't talk much about the death of her husband. But the fact that she started volunteering at the nursing home seven days a week immediately after her husband's death implies the depth of her emotional struggle to adjust to widowhood. Two years after her husband's death, Patty finally decided to take one day a week off for herself. In John's case, the experience of being laid off at the age of 56 and his retirement at 65 seem to have been traumatic. In his words,

> My work with this human rights organization is something which has always absorbed my interest. Of course, you have to attend meetings and organize, but it helps when you confront losing your job or being laid off. Or when you are retired and you suddenly have a lots of time on your hands. If you have something to do outside besides your professional work, it'll keep you moving around and keep your personality alive. I've been a member of this organization for a long time, so volunteering here is a way of continuing work without a "job".

Volunteering has helped John sustain some continuity in his life even after the drastic change in his professional status. After adjusting his life style, he's now actively involved in volunteering in several other places in his community. For both John and Patty, in fact, it is clear that volunteering provided them with an agenda or purpose in life and kept them busy on day to day basis when they were confronting what Mezirow called "disorienting dilemmas".

Besides these traumas caused by major life changes, Patty and John, who are both in their early 70s, share what Cole (1992) called the "fundamental conflict between spirit and body associated with aging" (p.239). The deterioration and death of people close to them made them realize the undeniable limitation of life, heightening their sense of how precious it is to be still young and healthy enough to do something not only for themselves but for others as well. Their passion for volunteering is the other side of their constant struggle with the fear of advancing age.

Another common theme linking both cases is the association of volunteering with learning and change. Patty and John each referred to their volunteer experiences as a constant learning process, mentioning their gain of new knowledge and insight about their organization, as well as people and society in general. In Patty's case, the more she got involved in volunteering at the nursing home, the more she came to realize the effects of government cutbacks, and the need they created. Having noticed the heterogeneity of individuals, families and cultures, she learned to be more sensitive to human differences. She was concerned about the poor treatment of the elderly by their family members, the indifference of the younger generation, and the shortage of volunteers. Based on her unsuccessful experience trying to recruit volunteers among her friends, she even came to advocate attitudinal change among seniors themselves:

> Of course, there are not so many opportunities in society for us. But also we seniors should also rethink our way of retirement. Just because you are retired, that doesn't mean you retired from everything. Of course it's your own business how you spend your retirement life, but at least give some time to society and help others besides bowling or going to Florida to play golf. That's why younger people sort of get jealous, like "they are getting pensions and traveling around, while we cannot find jobs". So seniors themselves need to modify their attitudes and try to give some of their time, even a few hours a week, for volunteering in their community. There are still so many things we can do for society.

John also has learned a variety of things. Through his activities at the human rights organization, he constantly gets new information which helps his larger understanding of politics and its effect on people around the world: in his words, "volunteering here helps you understand what's going in the world and why and where you have to take certain actions". In addition, he credits the evolution in his view about human relations to volunteering, describing it as follows;

> Volunteering gave me insights into how other people deal with various problems in society, about what various social groups need, how we are all interrelated and

> interactive. You know, we cannot exist individually. We have to work with each other. You have to learn how to get along with others to work for the same goal. You have to learn how to deal with people's idiosyncrasies. And realize we have idiosyncrasies they cannot stand. I guess that made me a more rounded person (laughs).

The type of learning happening here is "communicative learning", whose goal is "to try to establish the *validity*, or justification, for one's belief " (Mezirow, 1994, p.225) through making sense of new experiences. Through their problem-solving experiences in relation to others, both Patty and John came to a clearer understanding of who they are, what they want, what is needed in society, and what they can do. By making sense of and adapting their new experiences, balancing loss and gain, discontinuation and continuation, they entered into a constructive process of self-integration. This process involved not only rational discourse, as Mezirow (1991) originally emphasized -- it required a more holistic or experiential approach including other ways of knowing, like intuition and empathy as Taylor (1997) noted. Patty and John's accounts manifest the fact that learning is fostered by interaction with others: as Patty said, a volunteer site is "a community of learning from each other".

Another overarching theme is their high self-esteem and satisfaction gained through volunteering, although the sources of satisfaction in both cases don't necessarily connect directly to the concrete contents of their volunteer work. Their sources of satisfaction are rather abstract: the sense of contribution, a relatively good feeling about their health, self-growth and self-actualization through constant learning, socialization with others and the feeling of being needed, recognition and appreciation from other people. Volunteer experience provides confidence that one is healthy and capable of using one's knowledge and skills to solve various problems that arise in the course of one's work. When the value of this work is recognized, the satisfaction is particularly sweet. John commented:

> If you want to help others who are unable to help themselves, there are so many things you can get involved in. My contribution to the human rights organization is very minor. But it's still important. You know, there are many members in our organization all over the world, it's like an jigsaw puzzle, filling piece by piece of the globe when you try to complete the whole picture. The impact is greater if you work collectively. In most cases, you never meet those people you are helping, but it's

> important to use your energy to do something which is worthwhile and feel that you are doing something.

Patty also noted:

> I could do lot of things at home by myself, but I think I'm serving a worthy cause by coming here. I feel happy about it. That's the main thing, I think. I'm enjoying what I'm doing and I'm making myself worthwhile. As long as you feel worthy and you feel needed and you are satisfied with everyday life, that's fine. For me, it's the most valuable thing in life.

These accounts show how much the sense of making a difference provides these two people with a positive self-image. This in turn becomes a significant source of energy, keeping them actively involved and more generally improving their sense of well-being. Both Patty and John identified their stage of life as "payback time". Making society a better place provides them with meaning in their life, and possibly even a sense of spiritual immortality.

It is not clear, from this study, if they learned this sort of attitudinal "generativity" (Erikson, 1963; Kotre, 1984, Friedan, 1993) through volunteering or if it was already rooted in their natures. My impression is that compassion and the drive to help others in need have likely been an important part of their natures throughout their lives. Therefore, it would not be interpreted as a fundamental "perspective transformation" in Tennant's sense; yet it is clear that community volunteer experiences in their later lives significantly expanded those qualities, making them reorganize, reexamine, reinterpret, and integrate these components in their lives.

A pattern of empowerment through volunteering emerged in both Patty's and John's cases. This pattern is spiral: the traumas or changes associated with advancing age trigger their commitment to volunteering, the personal satisfaction gained from serving worthy causes energizes them to enhance their compassion and ego transcendence for collective needs, which in turn leads to further actions for change. These actions -- organizing volunteers to run fundraising and recreational programs for the elderly in a community nursing homes, or informing students about human rights -- may seem small, personal, even invisible by themselves, but, like John's "jigsaw puzzle", they may eventually lead to larger change if people work collectively.

Conclusion

My case studies of two older volunteers suggest that applying transformative learning theory to the study of later life development and aging can help shift the focus of our viewpoint, allowing us to see older adults not as mere "objects" of the problem of aging, but "subjects" who can participate in fixing problems, making a linkage between personal and social development.

The cases of Patty and John show that, if proper roles and conditions are provided, older adults can contribute their skills and wisdom to society. The communicative and holistic type of learning fostered by volunteering leads to critical reflections which help them confront the dilemmas associated with aging and proceed with their lives, shifting their old assumptions about themselves and the world around them. This can gradually lead to a clearer sense of self, a more accepting view of individual and cultural heterogeneity, a deeper understanding of society, and a heightened level of social integration. This is the process of the progressive realization of an individual's full potential.

Of course, the term "progressive" does not always involve upward movement in later life. Rather, development or growth in late adulthood may be appropriately understood as the adaptive process of making sense of one's experience to integrate oneself firmly in relation to others and society. As Baltes and Baltes (1990) and Baltes and Carstensen (1995) noted, when this adaptive process transpires with a minimization of loss and a maximization of gain, it is "successful" aging. The stories of Patty and John demonstrate how older adults can continue to learn and adjust their lives in the face of loss and discontinuity. If, like Patty and John, one can take action to change one's relationships with others and the community by negotiating one's purposes, values, and meanings rather than simply accepting those imposed from the outside, I think it can still be termed "emancipatory". Finally, the growing number of empowered seniors can push our changing society into a more inclusive and less age-graded direction, counteracting the prevailing negative stereotypes about old age and allowing for more choices in later life. To facilitate this liberating change, however, more strategic effort, especially among policy makers and practitioners, is

necessary so that we can plan to develop volunteer programs for older adults in a more effective and reciprocal way.

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